# Getting Started in WorkFlows with Terminology and Basic Properties

Let's get started with the basics of your Integrated Library System (ILS). The Montana Shared Catalog (MSC) is a consortium of libraries across the state of Montana that have decided to pool resources and use an ILS that that can support everyone's broad library needs. There are many types of libraries that use this system, including public, school, and private. The Montana Shared Catalog is maintained by the MSC Staff at the Montana State Library. The product we use is SirsiDynix Symphony. This document will go over the terminology and basic properties within the system to help you feel more comfortable moving around in the MSC. This is a good place to start if you have never worked with SirsiDynix Symphony or the Montana Shared Catalog, or if some terminology in a later training left you feeling confused.
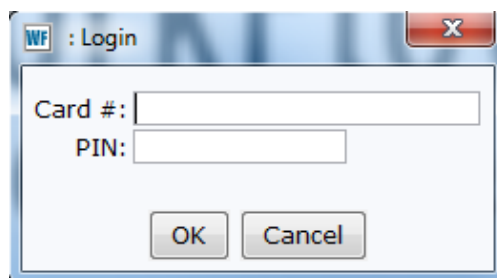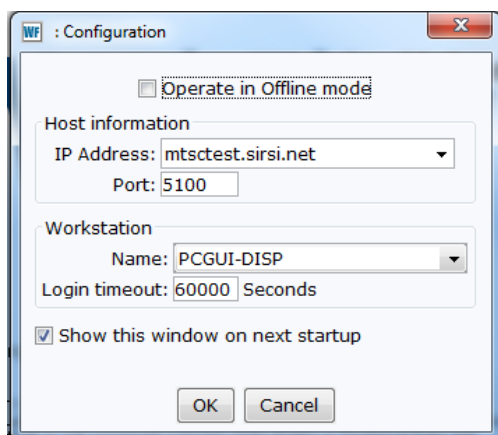
The program is called:

WorkFlows
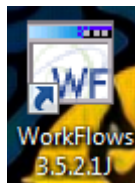
The icon will look something like this, possibly with a different version number if there have been new releases since the making of this document.
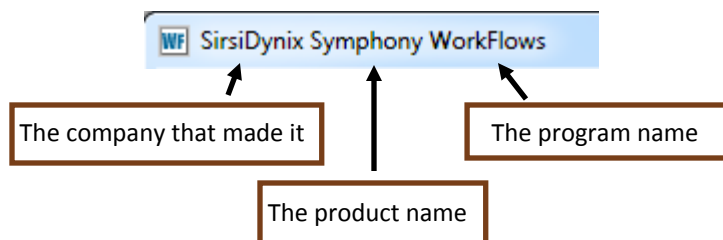
Opening this program will ask for your configuration and then login information:

Your login info will be provided by your library. Please ask your supervisor for your login ID (Card #) and PIN if you do not have this.

You will most often be logging into mtsc.sirsi.net, which is called the "Production Server". This is the live server where anything you change is a permanent change.

There is also a "Test Server", where you can play around with WorkFlows without actually making real and permanent changes. I am logging into the Test Server for this demo.

The company that made it

The product name

The program name

Terminology!

The Menu Bar

Module Bar

Wizards

Groups

Tells you if you are in Test (practice) or Production (live) Server. The icons might look slightly different than what is displayed here.

The Menu Bar is where you will find preference settings, like changing the look of WorkFlows. For example, I have changed my WorkFlows to the Blue theme, but there are many other color options. There will be a later tutorial that shows you more of what you can do in the Menu Bar.

Each Module in the Module Bar opens up a different set of Groups and wizards for you to use. They are organized by what you are working on, so if you are working the desk, you'll probably mainly be in the Circulation module, and if you are working in technical services, you will likely spend more time in the Cataloging module.

The Groups each hold corresponding wizards. You can expand and minimize Groups by clicking on each Group heading.

Wizards are this crazy word SirsiDynix made up for each application within WorkFlows. Each Wizard opens a new window in the blank area to the right of the Groups where work can be done. The next page will show some open wizards and introduce *more terminology.*

A little more terminology
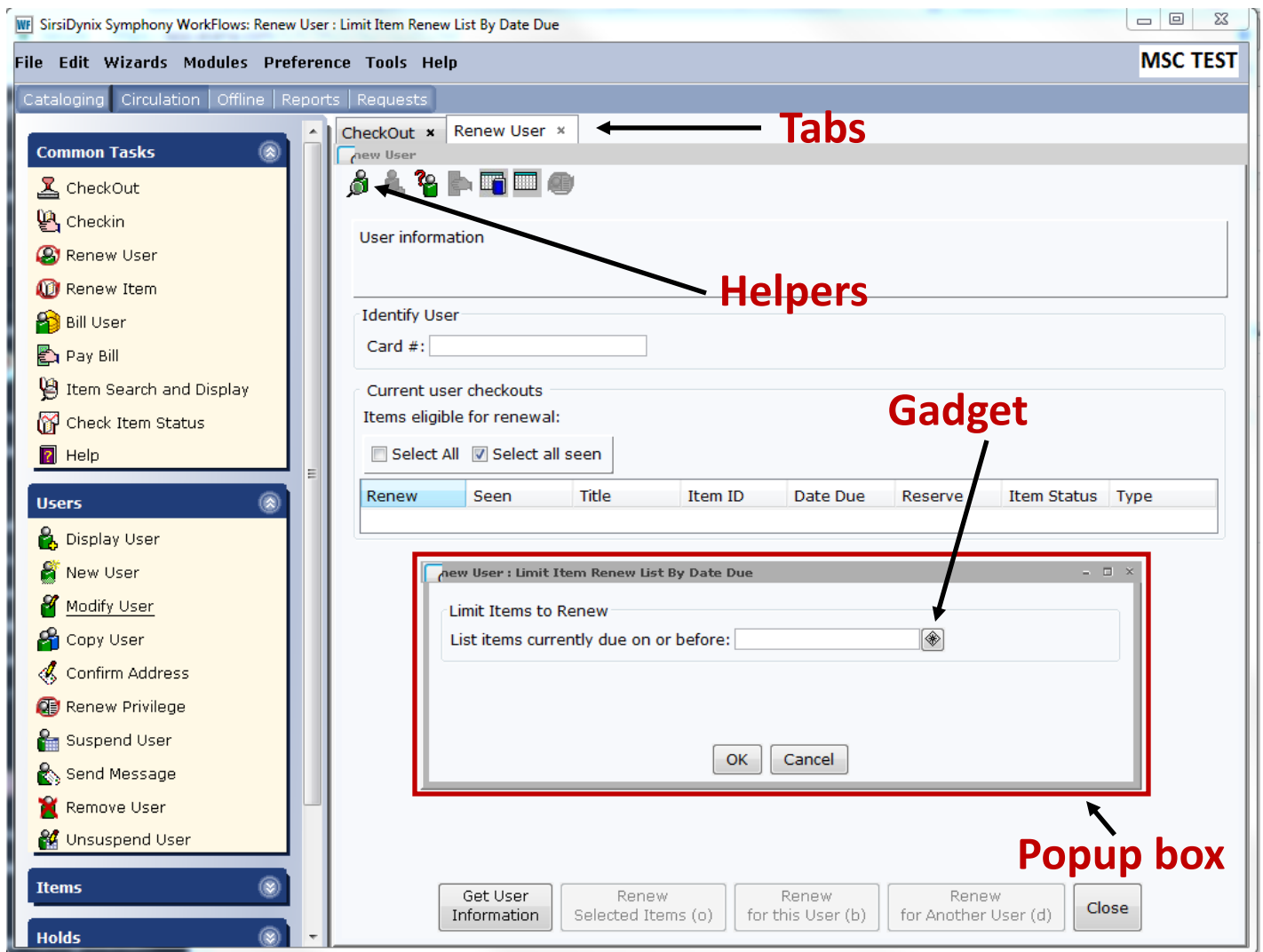
Tabs are just like tabs in your internet browser. They allow for multitasking - you can quickly switch between CheckIn and CheckOut or any other wizards. Tabs have to be set up in WorkFlows preferences (we will show you that in a later training), but just know that you may be able to have multiple tabs or you may be limited to one wizard open at a time.

Helpers are like mini-applications within a wizard. For example, the helper in this screenshot is the User Search Helper, which will help me look up a patron by name or any other parameter your library uses. Helpers usually open a Popup Box where you will complete the search or make the changes, then click OK to go back to the wizard with this new information selected.

A Gadget will be at the end of a text field when WorkFlows needs the information in the box to specifically match the way that information is formatted in the system. The tricky part is that you can still fill in that box with free text, but it will not work if it does not match exactly what WorkFlows wants. So, when a gadget is available, ALWAYS USE IT. It is like a drop down box where you will choose from a set of options or a specific calendar date.

F1 -

Pressing F1 anytime in WorkFlows will bring you to the SirsiDynix Help Guide. This is a great way to find out what each option is, what each checkbox does, what the helpers and the wizards do, and so much more.

Intro to Properties

Each wizard has it's own properties that you can set according to your own preferences.

When you choose or change properties in WorkFlows, they will remain the same on that computer each time you log in regardless of what login you use. By that I mean the properties are set per computer, not per login.

There are two ways to set properties - you can set them permanently by right clicking on the wizard and choosing properties, or you can set them each time you open a wizard. When you set them each time you open a wizard, they are only set temporarily until you close that wizard.

Let's take a look at this.

1. Right-click on a wizard (in the example I used CheckOut) and choose Properties.

2. A popup will display all of the properties available for that wizard. We will go into these in detail in a later training, but just point out a few things here.

3. The properties popup has three tabs: Behavior, Defaults, and Helpers. So when we talk about specific properties in later trainings, be aware that there are three places where they can be.

4. The Display Property Page options will be at the top of every Set Properties popup. Wizard Startup means properties will popup every time you start the wizard and what you set each time will be temporary. Never means what you set by right clicking will be the permanent setting for that computer each time you open the wizard. You can still change these, you just have to right-click each time you want to change them.
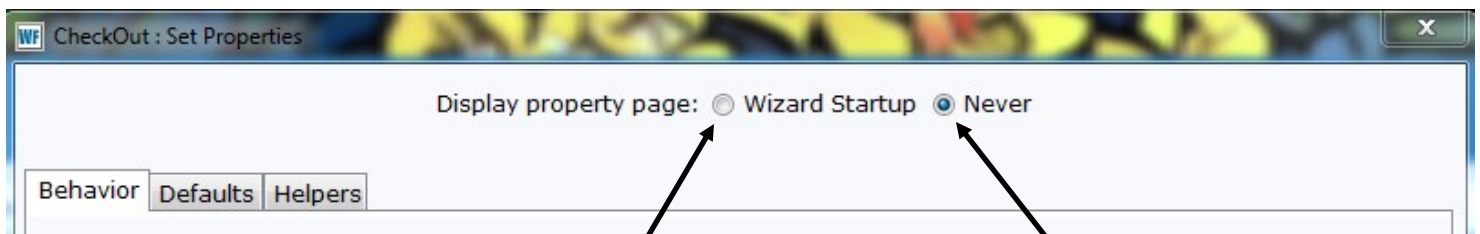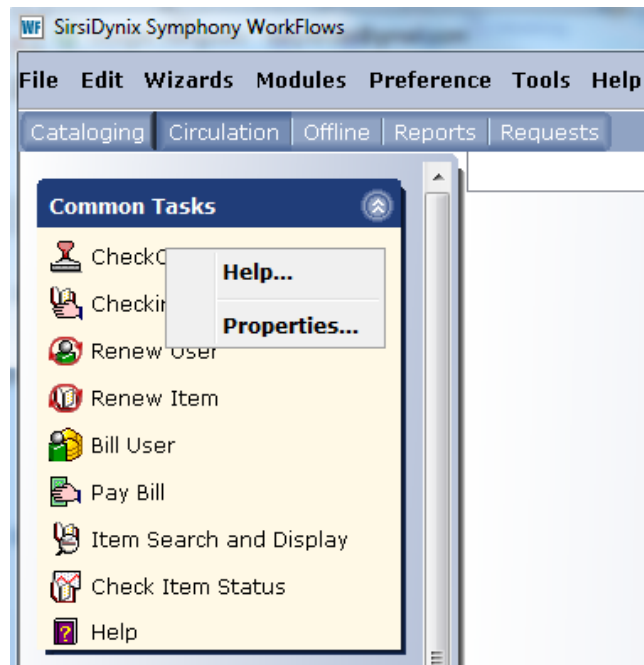
You might want to use this if you want to check and change the properties every time you open the wizard.

Use this if you want to set the properties once and never see them again. Each time you open the wizard, it will just open and work according to these properties. You can still review/change them using right-click.

More Resources:

- F1 - SirsiDynix help database
- Basic Properties video
- Desktop Setup and Local Toolbar Management video
- Circulation Properties document
- CheckIn Properties video
- CheckOut Properties video
- New User Properties video